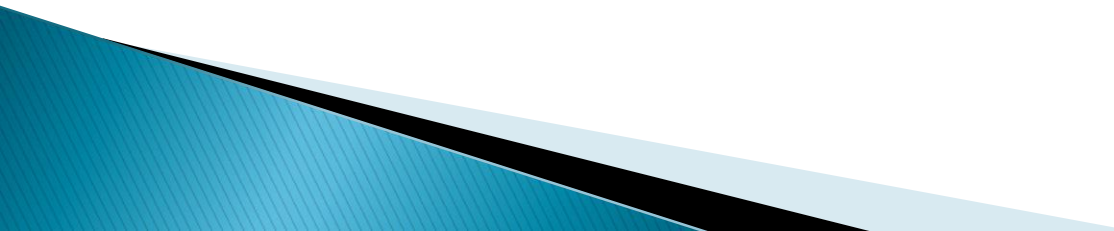


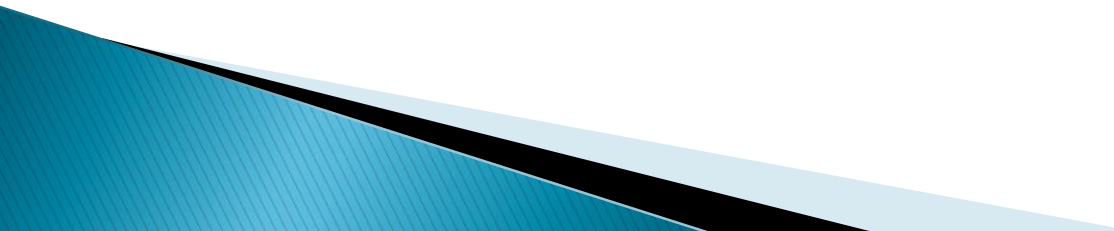
# The Reference Interview

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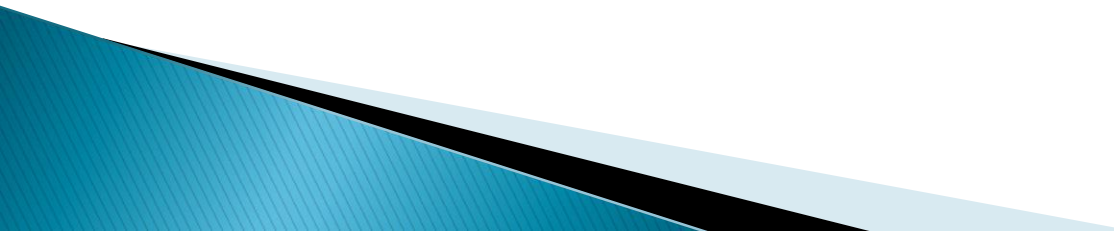
# Why do the reference interview?

- ▶ The goal of a reference interview is to clarify what information or resources the patron needs.
  - ▶ It is both an art and a science.
  - ▶ It should be adapted for every situation and every question.
  - ▶ It should be part of most library transactions.
- 

# When to do the reference interview

- ▶ Follow the reference interview model for most user questions.
  - ▶ Although many questions do not seem to need a reference interview, the user often has a more complicated information need than is immediately obvious.
  - ▶ The user may ask for information on a particular subject, but the user often has a much more specific question.
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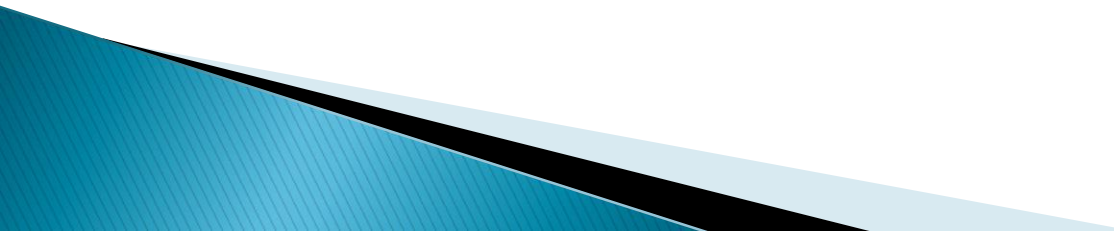
# Where to do the reference interview?

- ▶ We have always thought that the reference interview should be done at the reference desk. But some libraries do not have a reference desk.
  - ▶ The reference interview can be done wherever we encounter the user.
  - ▶ We may be talking to a user face to face, but it could also be on the phone or virtually.
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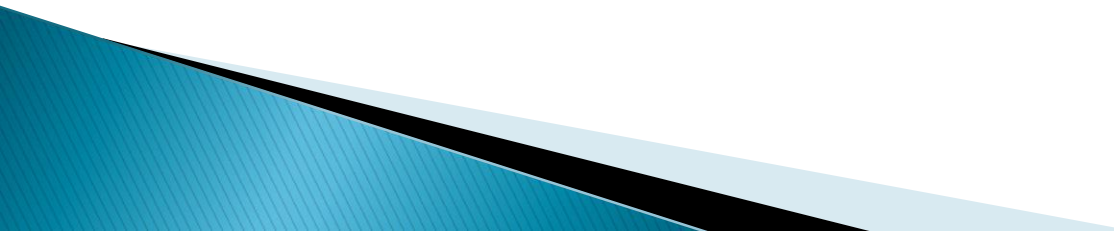
# Kinds of reference interviews

- Kinds of reference interviews
  - Face to face
  - Phone
  - Virtual – chat, email, text, etc.

# Reference interviews by subject

- ▶ General
  - ▶ Health
  - ▶ Reader's Advisory
  - ▶ People for whom English is a second language
- 

# The reference interview

- ▶ The reference interview is composed of several parts:
    - Establishing rapport with the user
    - Negotiating the question
    - Developing a successful search strategy and communicating it to the user
    - Locating the information and evaluating it
    - Ensuring that the question is fully answered – the follow-up
    - Closing the interview
- 

# Establishing rapport with the user

The librarian must appear approachable and interested in the user's question by listening carefully.

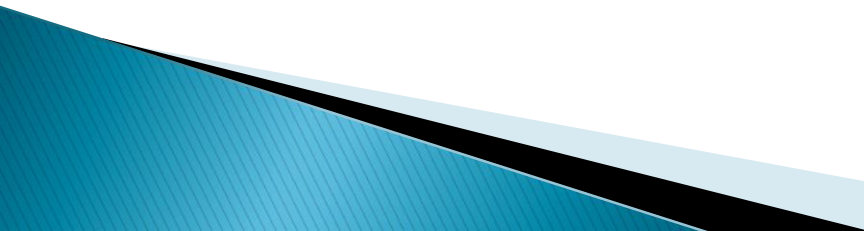
In person the librarian can do this by greeting the user in a friendly upbeat manner and maintaining eye contact, nodding, smiling.

Both conduct and content are important.

Virtually the librarian must use words that convey the librarian's interest in the user's question such as a friendly "hello"



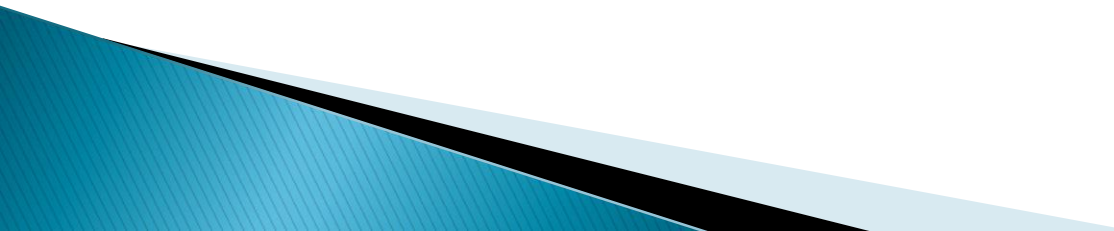
# Negotiating the question

- ▶ The librarian should use neutral, open-ended questions to find out what the user needs.
  - ▶ Examples - Open-ended - “Tell me more about your topic” and close-ended - “Do you need current information?”
  - ▶ It is important to find out how the user will be using the information - the context
  - ▶ Although open-ended questions elicit more information from the user, some close-ended questions may also be needed
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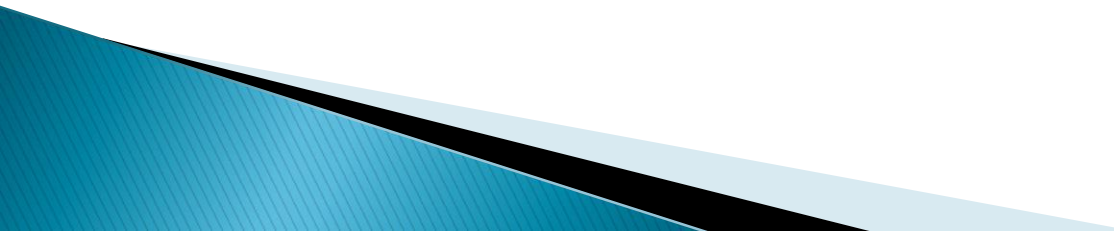
# Negotiating the question 2

- ▶ The librarian should listen carefully and ask clarifying questions.
- ▶ Users try to frame question the way they think the library is organized.
  - Where would I find a directory of museums?
  - Where can I find a list of companies and addresses?
  - Where are the newspapers?
- ▶ Once the librarian understands the question. The librarian should paraphrase or summarize the question to be sure that the user agrees.

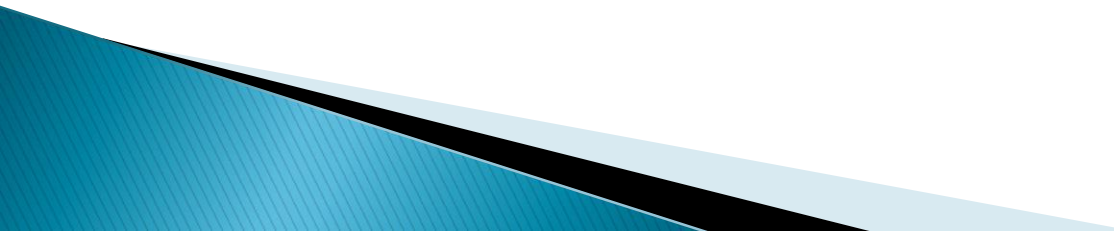
# Communication accidents

- ▶ Playing twenty questions
  - ▶ Misunderstanding the question – different words that sound the same such as China and china
  - ▶ Making assumptions about what the person wants
  - ▶ Not following up
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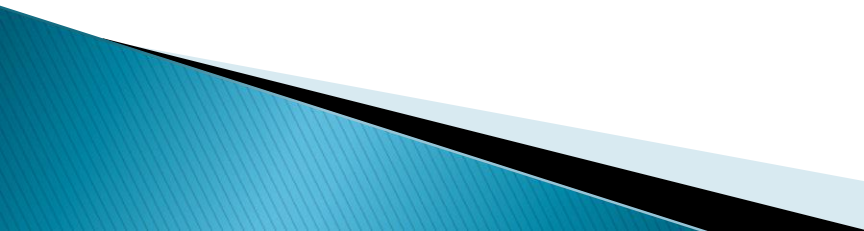
# Developing a successful search strategy

- ▶ Librarian should select appropriate search terms with the assistance of the user.
  - ▶ Find out what format is needed as well the amount of material and level.
  - ▶ Librarian should select appropriate reference sources.
  - ▶ Appropriate sources means identifying more general sources or more technical sources depending on the question.
- 

# Locating the information

- ▶ As the librarian identifies resources, it is important to keep checking with the user to see if the resources identified are meeting the user's needs.
  - ▶ The librarian should evaluate the resources identified for quality and the right level for the user.
  - ▶ Is library instruction appropriate?
- 

# Ensuring the question is fully answered – the follow-up

- ▶ The follow-up is an important part of the interview.
  - ▶ Is this the kind of information you were hoping to get?
  - ▶ If you don't find what you need, please come back or contact me again
  - ▶ It is important to see if the user's question has been completely answered.
  - ▶ The follow-up can give the user a chance to say that they need more information or a different kind of information
- 

# Closing the interview

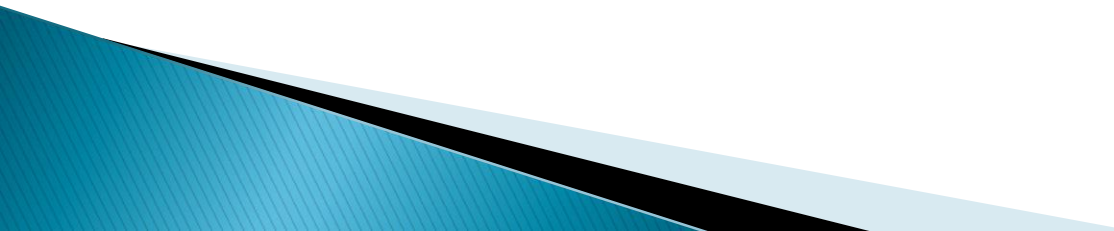
- ▶ Interviews should close on an open note so that the user feels they can return for further assistance or with other questions in the future.

# Evaluation

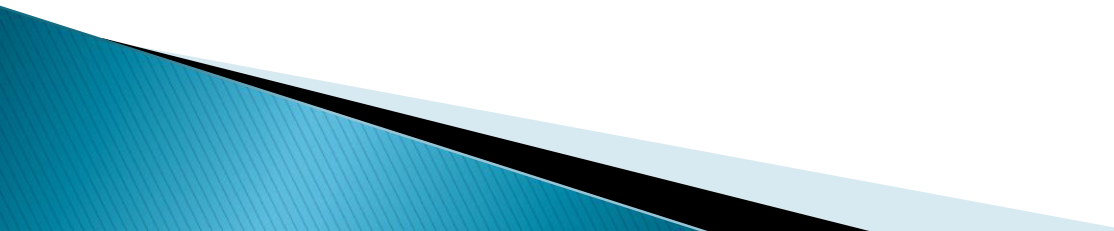
- ▶ Libraries often ask the user to evaluate their library experience.
- ▶ They might ask would the user come back for more help from the same librarian.



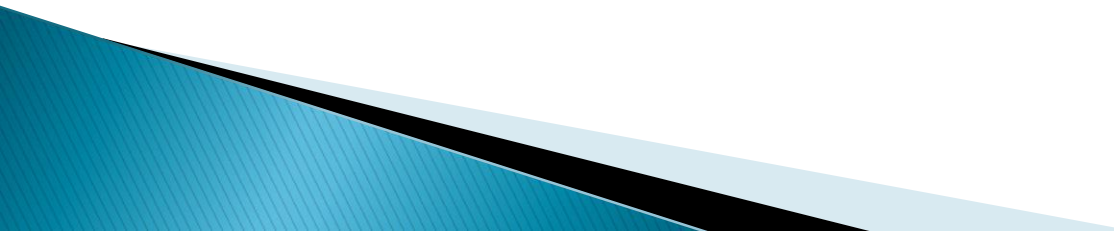
# The reference interview by telephone

- ▶ Have a pleasant voice & identify yourself
  - ▶ Listen to the tone and inflection of the user
  - ▶ Use minimal encouragers such as “yes”, “interesting”, “I understand”, etc.
  - ▶ Follow the interview guidelines
  - ▶ Ask open-ended questions
  - ▶ Keep the silent time to a minimum
- 

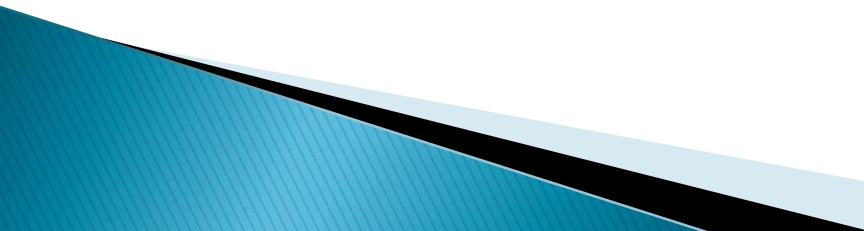
# The reference interview by telephone

- ▶ Explain what you are doing
  - ▶ Cite your sources in the answer
  - ▶ Encourage the user to call again
  - ▶ Have telephone reference policies
- 

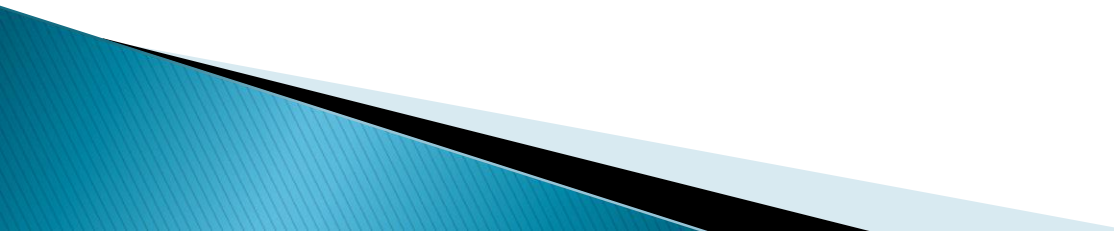
# The virtual reference interview

- ▶ Virtual reference has become more popular since the pandemic
  - ▶ It includes e-mail, chat, IM and text messaging
  - ▶ For e-mail use a well-designed form to gather information – collecting enough information is essential since it is hard to go back and get a response
- 

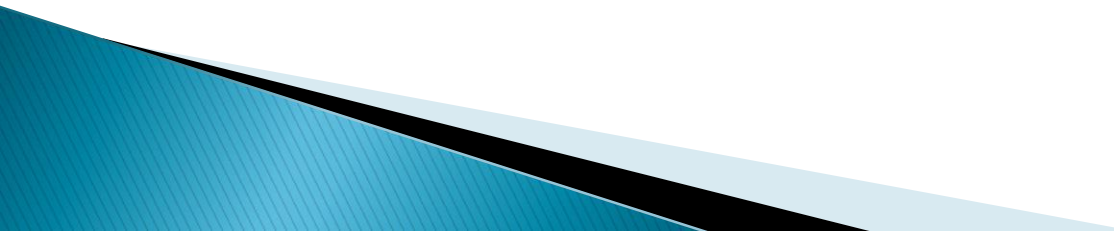
# The virtual reference interview 2

- ▶ Chat, IM and text messaging are in real time – get an e-mail for follow-up if possible
  - ▶ Use a personal greeting such as “Hi Alice, what an interesting question!”
  - ▶ Try to clarify the question by asking more questions
  - ▶ Find out more about the user – level of material needed and amount of material needed
  - ▶ Mirror the user’s style of writing if possible
- 

# The virtual reference interview 3

- ▶ Repeat the question to see if you are understanding it
  - ▶ Tell the user what steps you are taking since they can't see you
  - ▶ Use inclusive language – “we”, “us”
  - ▶ Ask for feedback often
  - ▶ Don't assume that the user needs a fast answer
- 

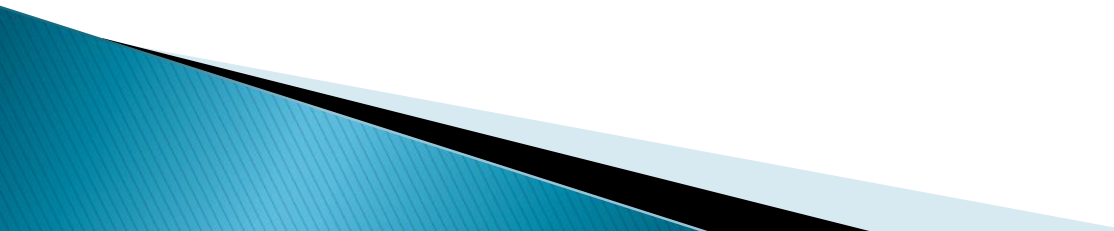
# The virtual reference interview 4

- ▶ Research has shown that chat is the most popular for research-oriented questions
  - ▶ It is important to have a well-written response since it shows that the librarian puts importance on the question
  - ▶ Virtual reference can be good for people who don't speak or understand English well
- 

# The imposed question

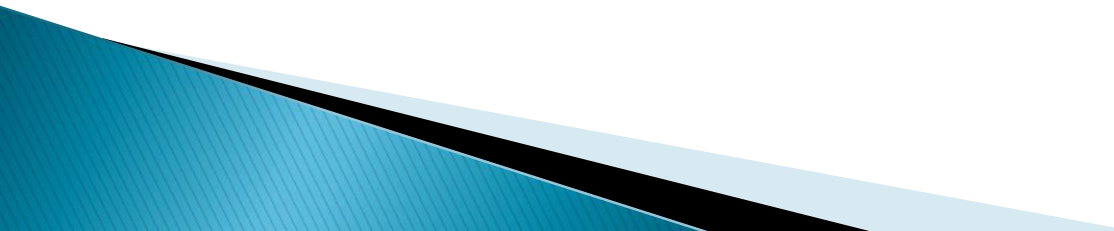
- ▶ The imposed question
  - Sometimes the person who needs the information is not the one who asks the question
  - This makes it hard to clarify the question
  - For example –
    - The parent could be asking a question for the child
    - The person is asking the question for another person
    - The research assistant could be asking the question for the professor

# Negative closure

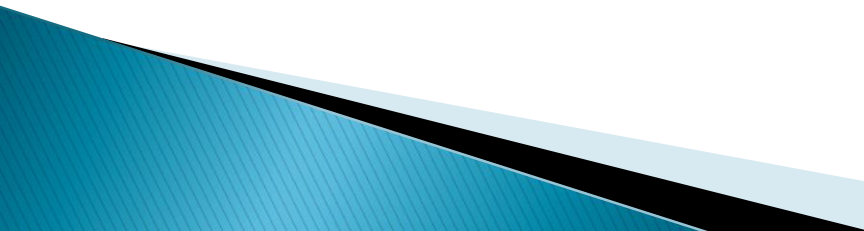
- ▶ Try to avoid negative closure
  - ▶ This is when you send the user away knowing that the question has not been answered
  - ▶ For example, the librarian may say that the answer cannot be found
- 



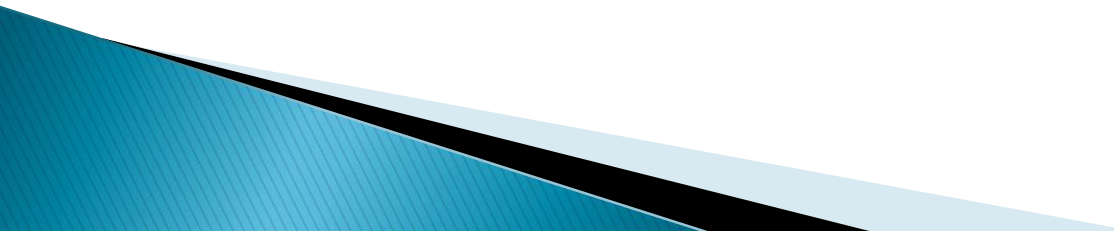
# Unmonitored referral

- ▶ Sometimes the librarian sends the user away not knowing if the user will find what they want
  - ▶ Such as
    - Giving the user a call number and saying “browse”
    - Sending the user to another floor
    - Not following up
- 

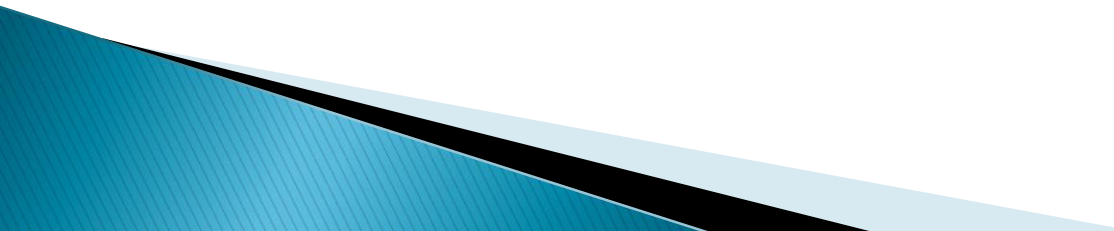
# Health reference interview

- ▶ In addition to the more general reference interview, the librarian should be aware importance of current and accurate information when health questions are asked
  - ▶ When evaluating health information, be aware of the authority of the publisher, i.e. do not use sources that have potential financial stakes
  - ▶ Ask about goals of the user – try to find out if information is for someone else – maybe a child or an older adult
- 

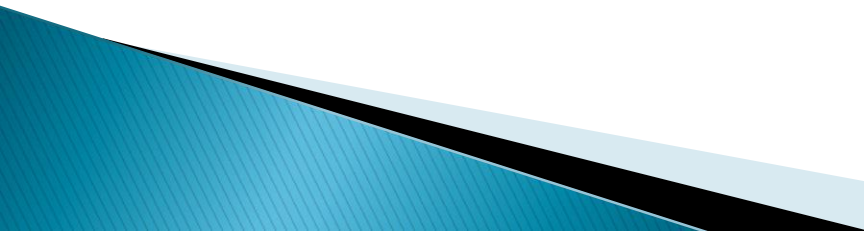
# Health reference interview

- ▶ Find out where the user has already looked and how much information they already have
  - ▶ Use national sources of information such as government resources or a well-regarded hospital's website
- 

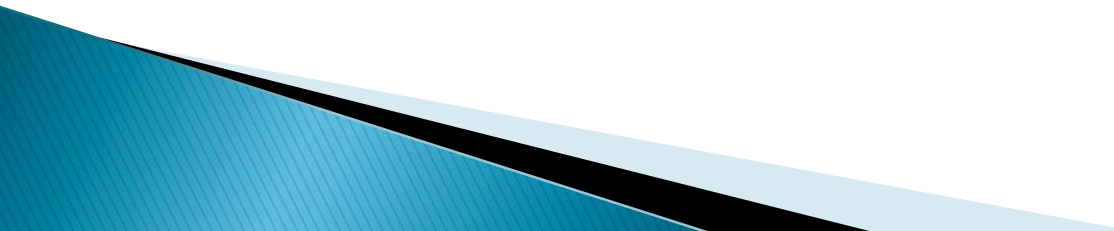
# People from a variety of cultural backgrounds

- ▶ Whether face to face or virtual it is so important to understand who the user is
  - ▶ Sometimes the user does not speak English as their first language so virtual can work better or writing information down helps and speaking slowly
  - ▶ In person be aware of body language and differences in space between the user and the librarian as well as cultural nuances
  - ▶ Be positive
- 

# Reader's advisory interview

- ▶ A reader's advisory (RA) interview is more like a conversation
  - ▶ Most of the time RA is combined with reference
  - ▶ The RA interview can be face to face or virtual
  - ▶ The virtual interview has developed more due to Covid
  - ▶ Opening questions
    - Tell me about a book you have enjoyed (Sarick)
    - What are you in the mood to read (Wyatt)
- 

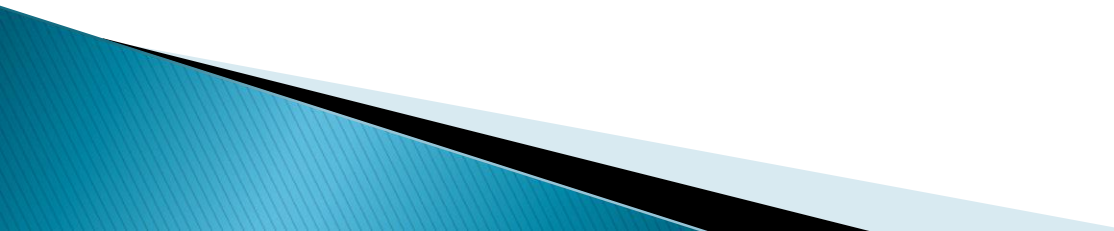
# Reader's advisory interview 2

- ▶ Useful things to consider
    - Appeal factors
    - Genres
    - Rejection factors
    - Use lists such as read alike lists and RA tools when appropriate
    - Be respectful of a reader's tastes – do not impose your own
- 

# Reader's Advisory Interview 3

- ▶ The virtual RA interview
  - Can interview the user by phone or virtually
  - Gives the librarian time to work on selections
  - Can make a selection of books for the user to pick up or select e-books

# Things to practice

- ▶ Looking approachable
  - ▶ Listening skills
  - ▶ Knowledge of reference sources
  - ▶ How to pose questions
  - ▶ How to ask follow-up questions
  - ▶ How to close the interview
- 



# Thank you

- ▶ You can contact me at [kcassell@rutgers.edu](mailto:kcassell@rutgers.edu)